

CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM
CONSULTING SERVICES – INVESTMENT OPPORTUNITIES THROUGH
DIVERSITY (SPRING-FED POOL)

REQUEST FOR PROPOSAL NO. 2005-3805

FINALIST SUMMARIES

ALTURA CAPITAL ADVISORS, LLC

IVY PLANNING GROUP, LLC

MOSAIC INVESTMENT ADVISORS, INC.

RG & ASSOCIATES

ALTURA CAPITAL ADVISORS, LLC

Altura Capital Advisors, LLC is jointly owned by Monika Mantilla and SAR Holdings. Mantilla is President and CEO and has nine years experience in investment management consulting, private equity, and strategic and financial advisory services. SAR Holdings is owned by Samuel Ramirez, Sr., who founded the largest and oldest Hispanic-owned investment banking firm in the United States. The firm is based in New York City, New York.

Altura provides advisory services and designs investment products for the institutional marketplace. Altura has two divisions comprised of Institutional Advisory Services and Institutional Investment Products. Altura provides methods, research, benchmarks and implementation tools for institutional investors. The firm's core expertise is diversity in the management of investments.

Altura is currently working with CalPERS and CalSTRS to develop a comprehensive database of emerging managers and other emerging financial provider firms.

Altura will utilize the resources of Evaluation Associates, Hebb, Knight and Associates, and the Duran Group as subcontractors.

IVY PLANNING GROUP, LLC

Ivy Planning Group, LLC is a minority and woman-owned firm founded in 1990 and based in Rockville, Maryland. The firm is named for the principals' (Janet Crenshaw Smith, Gary Smith, and Raymond Suarez) Ivy League educational backgrounds.

Ivy provides full-service management-consulting specializing in diversity consulting, assessment, management and training, and is a recognized industry leader in helping build company-wide diversity initiatives.

Ivy's staff persons are senior professionals with experience in strategic planning, organizational management, policy development, change management, and performance measurement, and have track records of supporting large accounts.

Ivy has provided financial services and strategic and marketplace diversity initiatives for large public sector and Fortune 1000 corporate clients including Lockheed Martin, Verizon, Rockwell Collins International, Harrah's, Nike, L'Oreal USA, United Way of America, and Special Olympics International. The firm is a nationally known Diversity Crisis Management Advisor to large organizations.

Ivy will utilize the resources of Black and Company and Mischler Financial Group as subcontractors.

MOSAIC INVESTMENT ADVISORS, INC.

Mosaic Investment Advisors, Inc. was founded in 2002, is 100 percent owned by Warren Henderson, based in Hopkinton, Massachusetts, and has an office in Boston, Massachusetts.

Mosaic has experience providing consulting, investment advisory and investment related services to institutional clients. Mosaic's key personnel have over 60 sixty years combined experience with institutional investors. Mosaic specializes in management consulting, product consulting, marketing, sales strategy and coaching and marketing support services to emerging managers.

Mosaic is an active member of the National Association of Securities Professionals and supporter of the Robert A. Toigo Foundation.

Mosaic will utilize the resources of The Results Group, Mischler Financial Group, and Deluna Partners as subcontractors.

RG & ASSOCIATES

RG & Associates is a Limited Liability Company founded in 2001 by Renae Griffin and based in Oakland, California.

RG & Associates key personnel have over 20 years experience in the financial services industry including marketing, client services, and production of financial services conferences and events. In the past two years, RG & Associates has independently produced four pension conferences specifically focused on diversity and promoting increased opportunities for emerging investment managers and advisors. RG & Associates has built extensive relationships with plan sponsors, consultants, and emerging managers. RG & Associates' services are not exclusively based on its meeting planning expertise, but also on direct investment industry experience, its broad network, and its expansive database used in program development of events and to target appropriate audiences.

RG & Associates has extensive experience producing conferences and events in the United States and Europe. Events range from small focus groups to large conferences concentrating on the financial industry. RG & Associates annually produces national conferences promoting diversity.

RG & Associates will utilize the resources of Dominic Phillips Event Marketing, Karier Designs, and Segesta Communications as subcontractors.